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Poultry Programs

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Poland

Egg production in Poland in 2002 amounted to 9 billion eggs of which 7.4 billion came from private producers. In that year there were 747 registered producers. Exports totaled 140 million eggs, up 90 million on the year. Average prices dropped by 30%, which gave consumption a boost to 210/person. An increase in output of 2.2% is forecast for this year 9.2 billion and a further reduction in retail prices is expected to push consumption up to an average of 214/person.

Source: International Egg Commission

Netherlands

From 2004, supermarkets in the Netherlands will stop selling eggs from hens that live in battery cages. All large supermarkets in the country will only sell free-range eggs and eggs from poultry farms that raise hens in open barns, according to animal rights group Wakker Dier.

Source: International Egg Commission

International Chick Placements

During March, 2003, European Union (EU) chick placements showed a provisional decrease of 11% compared with the same month in 2002 (21,025,000 compared with 23,746,000) and were 16% lower than the 2001 level (25,168,000). This significant decrease is due to the Avian Influenza in the Netherlands.

Increases during March were recorded in; Finland (+3%), Italy (+5%) Germany +9% and Sweden (+40%). Decreases were recorded in Austria (-2%), Denmark (-20%), France (-12%) and in the United Kingdom (-21%).

During the period January-March, 2003 EU chick placements showed a provisional decrease of 3% compared with the same period in 2002 (64,216,000 compared with 66,395,000) and were 7% lower than the 2001 level (68,837,000). This significant decrease is due to the Avian Influenza crisis in the Netherlands.

Placements during March, 2003 increased in Hungary (+42%) and Switzerland (+8%). During March, 2003 placements also increased in; Brazil (+10%), Australia (+11%) and Japan (+1%), while a decrease of 23% was recorded in New Zealand.

During March 2003 placements in the USA decreased by 1% compared with the same month in 2002. During the period January-March 2003 placements decreased by 6% on the same period during 2002 (50,107,000 compared with 53,419,000) and were 16% lower than the 2001 level (58,584,000).

Source: International Egg Commission

International Egg Commission

The U.S. Department of Agriculture on July 3, 2003 announced funding allocations totaling \$1.4 million to 18 organizations under the fiscal 2003 Quality Samples Program (QSP) to help expand export sales by promoting awareness of U.S. agricultural products to new foreign buyers. Recipients are reimbursed for certain costs of purchasing and transporting commodity samples to be used in projects that

provide foreign importers with information about the attributes characteristics and use of U.S. commodities. USA Poultry and Export Council received \$75,000.

A second round of funding totaling \$1.1 million is expected to be available for application later this summer under the fiscal 2003 QSP. Source USDA/FAS News Release

Russia

Russia is considering implementing a ban on poultry from the European Union (EU) for a number of reasons. One of their major concerns is that the EU is lifting their restrictions on poultry from Belgium, the Netherlands and Germany prematurely. The EU has said the restrictions will be lifted on July 11, 2003. Restrictions were placed on these countries by the EU as a result of the emergence of Avian Influenza in the Netherlands in February, 2003. Russian veterinary officials are concerned that any danger of the Avian Influenza passing from the EU to Russia has not disappeared yet. The officials want to eliminate any chance of the flu spreading to Russia since they don't think Russia can afford to spend 200 plus Euros (\$230 million) on their own farmers.

Russia has also accused the EU having a double set of standards, one for imports and one for exports. Officials from Russia claim to let the EU have free access to their market while the EU will raise a bunch of concerns when Russia tries to export there. In order to ease some of Russia's concerns, the EU has signed a unified veterinary certificate that will replace the bilateral certificates that each individual EU country has with Russia. Russia purchased up to a third of the EU's total 2002 poultry exports, or 264,000 metric tons. Last year 20 percent of Russia's imports came from the EU.

Meanwhile, there is also concern by U.S. producers that Russia might repeal their current by-country import division of quotas resulting in a possible cut of poultry exports by up to 40% to Russia. If this were to happen part of the quota might go to Brazil which had increased poultry exports to Russia last year.

Russia had allotted for 2003 a total of 744,000 metric tons to be imported out of which the USA had received 553,500 tons, or 75% of the market share. So far, in 2003, the U.S. has shipped over 477,000 metric tons of poultry to Russia. Russia allotted the EU 139,900 tons and Brazil 33,300 tons of imported poultry for 2003.

On July 1, 2003, the Russian Ministry of Agriculture announced the results of an inspection tour of U.S. poultry processing facilities conducted between April and June, 2003. Of the 341 plants and cold storages inspected, 172 were given unconditional approval to export, 93 conditional approval pending correction of cited deficiencies and 76 facilities were excluded. Overall, the number of approved suppliers to Russia from the U.S. declined 40-43% when compared to the previous years. Some industry personnel feel that the reduced number will not affect the volume of poultry exported to Russia.

Source: various new sources

Inspected Egg Products-U.S. & Canada Export/Import Trade**U.S. Exports to Canada, in Pounds (000) (Preliminary)**

Week Ending July 05, 2003	2003	2002/1	2003	2002
Liquid	556	448	8,626	10,124
Frozen	0	0	3	21
Dried	14	8	271	328
Total	570	456	8,900	10,473

U.S. Imports From Canada, in Pounds (000) (Preliminary)

Week Ending July 05, 2003	2003	2002/1	2003	2002
Liquid	116	165	3,048	3,586
Frozen	46	4	1,684	1,883
Dried	40	154	841	2,947
Total	202	323	5,573	8,416

Inspected Shell Eggs**U.S Exports To Canada, In 30-Dozen Cases (Preliminary)**

Week Ending July 05, 2003	2003	2002 /1	2003	2002
Jumbo	15	0	256	1,161
Extra Large	410	90	11,857	11,965
Large	3,250	3,433	50,365	67,445
Medium	1,710	0	33,978	26,592
Ungraded	2,880	0	40,626	172,235
Misc	0	0	3,852	12,184
Total	8,265	3,523	140,934	291,582

/1 Comparable Week, to-date figures may not total due to rounding.

Source: USDA/AMS Poultry Programs, Market News Branch in cooperation with Agriculture Canada, Poultry Development Division.

LIVE POULTRY SLTRD UNDER INSPECTION W/E 05-Jul-03

(PRELIMINARY)

U.S. FOWL SLAUGHTERED DOMESTICALLY

	LIGHT HENS	HEAVY HENS	TOTAL HENS
	THOUSANDS		
HEAD	1,019	1,179	2,198
LAST WEEK	1,474	1,544	3,018
SAME WEEK YR AGO	1,137	1,037	2,174
TO-DATE/2003	43,887	36,491	80,378
TO-DATE/2002	48,212	35,970	84,182

U.S. FOWL SLAUGHTERED IN CANADA

	LIGHT HENS	HEAVY HENS	TOTAL HENS
	THOUSANDS		
HEAD	219	0	219
LAST WEEK	121	0	121
SAME WEEK YR AGO	208	4	212
TO-DATE/2003	6,742	100	6,842
TO-DATE/2002	8,691	42	8,733

SOURCE: AGRICULTURE CANADA, PLTRY DEVELOPMENT DIV.

TOTAL U.S. FOWL SLAUGHTERED IN THE U.S. AND CANADA

	LIGHT HENS	HEAVY HENS	TOTAL HENS
HEAD	1,238	1,179	2,417
LAST WEEK	1,595	1,544	3,139
SAME WEEK YR AGO	1,345	1,041	2,386
TO-DATE/2003	50,629	36,591	87,220
TO-DATE/2002	56,903	36,012	92,915

SOURCE: USDA/AMS PLTRY PROGRAMS, MARKET NEWS BR.

CENTRAL REGION MECHANICALLY SEPARATED CHICKEN

F.O.B. SHIPPER DOCK OR EQUIVALENT, PRICES NEGOTIATED FOR MECHANICALLY SEPARATED CHICKEN IN THE CENTRAL REGION IN TRUCKLOT AND LESS THAN TRUCKLOT VOLUMES, CENTS PER POUND, DELIVERY WITHIN TWO WEEKS.

11-JUL-2003				
CHICKEN				
PRICES (Cents per Pound)				
FAT CONTENT	FROZEN	FRESH	TOTAL	EXPORT
15% OR LESS				
RANGE	-	-	-	-
WTD AVERAGE				

CHICKEN, WITH SKIN ADDED

11-JUL-2003				
CHICKEN				
PRICES (Cents per Pound)				
FAT CONTENT	FROZEN	FRESH	TOTAL	EXPORT
15% OR LESS				
RANGE	-	13.00-17.00	102,000	-
WTD AVERAGE		15.40		
15-20%				
RANGE	13.00-18.00	10.00-16.00	3,056,000	1,224,000
WTD AVERAGE	15.50	12.39		
20% OR MORE				
RANGE	-	-	-	-
WTD AVERAGE				

* INCLUDES THE STATES of AL, AR, IA, IL, IN, KS, KY, LA, MI, MN, MO, MS, ND, NE, OK, OH, SD, TN, TX, WI

11-JUL-2003				
CHICKEN				
PRICES (Cents per Pound)				
FAT CONTENT	FROZEN	FRESH	TOTAL	EXPORT
15% OR LESS				
RANGE	-	-	-	-
WTD AVERAGE				

CHICKEN, WITH SKIN ADDED

11-JUL-2003				
CHICKEN				
PRICES (Cents per Pound)				
FAT CONTENT	FROZEN	FRESH	TOTAL	EXPORT
15% OR LESS				
RANGE	15.00-18.50	16.00	608,000	520,000
WTD AVERAGE	16.74	16.00		
15-20%				
RANGE	14.00-17.00	11.00-16.00	1,912,000	312,000
WTD AVERAGE	15.81	12.50		
20% OR MORE				
RANGE	-	11.00	80,000	-
WTD AVERAGE		11.00		

* INCLUDES THE STATES of CT, DE, FL, GA, MA, MD, ME, NC, NH, NJ, NY, PA, RI, SC, VA, VT, WV

NATIONAL YOUNG TURKEY PARTS AND BULK MEAT, FROZEN (UNLESS SPECIFIED), CENTS PER LB., DELIVERED FIRST RECEIVERS, PART AND FULL TRUCKLOTS AS OF 11 JULY 2003.

The undertone on fresh tom breast meat and fresh destrapped tenderloins was mostly steady, balance of fresh white meat was steady to barely steady. The frozen white meat undertone ranged from at least steady on frozen tom breast meat from new production to barely steady at best on older supplies. The undertone on frozen thigh meat and mechanically separated turkey (MST) ranged from steady to firm for Russia and mostly steady for other destinations. The undertone on fresh thigh meat and fresh MST was steady to instances fully steady for the light to fair demand. Offerings light to adequate. Domestic trading light. Fresh wing meat traded at 41 and fresh scapula at 51 cents delivered domestic. Export trading was heavy on frozen thigh meat, MST and fresh tom drums, balance slow. For export: livers 17, hearts 21, fresh tom drums 22 cents delivered.

FRIDAY, JULY 11, 2003**EXPORT TRADING**

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)	WEEKLY WTD AVG PRICE	WEEKLY VOLUME (000)
DRUMSTICKS, TOMS	26.00		26.00	40	25.02	864
WINGS FULL-CUT - TOMS						
WINGS, V-TYPE, TOM		R	25.00	208	24.33	312
TAILS	21.00		21.00	40	20.25	80
MECHANICALLY SEPARATED 2/	16.00-20.00		17.85	1,408	17.77	2,640
THIGH MEAT - FROZEN	46.50-65.00		52.80	1,156	50.65	2,160

THURSDAY, JULY 10, 2003**EXPORT TRADING**

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)		
DRUMSTICKS, TOMS	24.00-25.00		24.11	352		
WINGS FULL-CUT - TOMS						
WINGS, V-TYPE, TOM	25.00		25.00	208		
TAILS		W	19.50	40		
MECHANICALLY SEPARATED 2/	18.00		18.00	832		
THIGH MEAT - FROZEN	46.00-55.00		48.26	508		

WEDNESDAY, JULY 09, 2003**EXPORT TRADING**

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)		
DRUMSTICKS, TOMS	23.50-27.00		25.62	472		
WINGS FULL-CUT - TOMS						
WINGS, V-TYPE, TOM	23.00		23.00	104		
TAILS	19.50		19.50	40		
MECHANICALLY SEPARATED 2/	17.00		17.00	400		
THIGH MEAT - FROZEN	45.00-52.00		48.11	496		

TUESDAY, JULY 08, 2003**EXPORT TRADING**

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)		
DRUMSTICKS, TOMS		T	24.59	296		
WINGS FULL-CUT - TOMS		T	20.00	324		
WINGS, V-TYPE, TOM		W	25.00	216		
TAILS						
MECHANICALLY SEPARATED 2/		W	14.50	108		
THIGH MEAT - FROZEN		F	50.50	40		

MONDAY, JULY 07, 2003**EXPORT TRADING**

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)		
DRUMSTICKS, TOMS		T	24.59	296		
WINGS FULL-CUT - TOMS		T	20.00	324		
WINGS, V-TYPE, TOM		W	25.00	216		
TAILS						
MECHANICALLY SEPARATED 2/		W	14.50	108		
THIGH MEAT - FROZEN		F	50.50	40		

1/ CODES FOR LAST SIGNIFICANT TRADE (L.S.T.): M=MONDAY T=TUESDAY W=WEDNESDAY R=THURSDAY F=FRIDAY

2/ Product contains 15-20% fat with skin added.